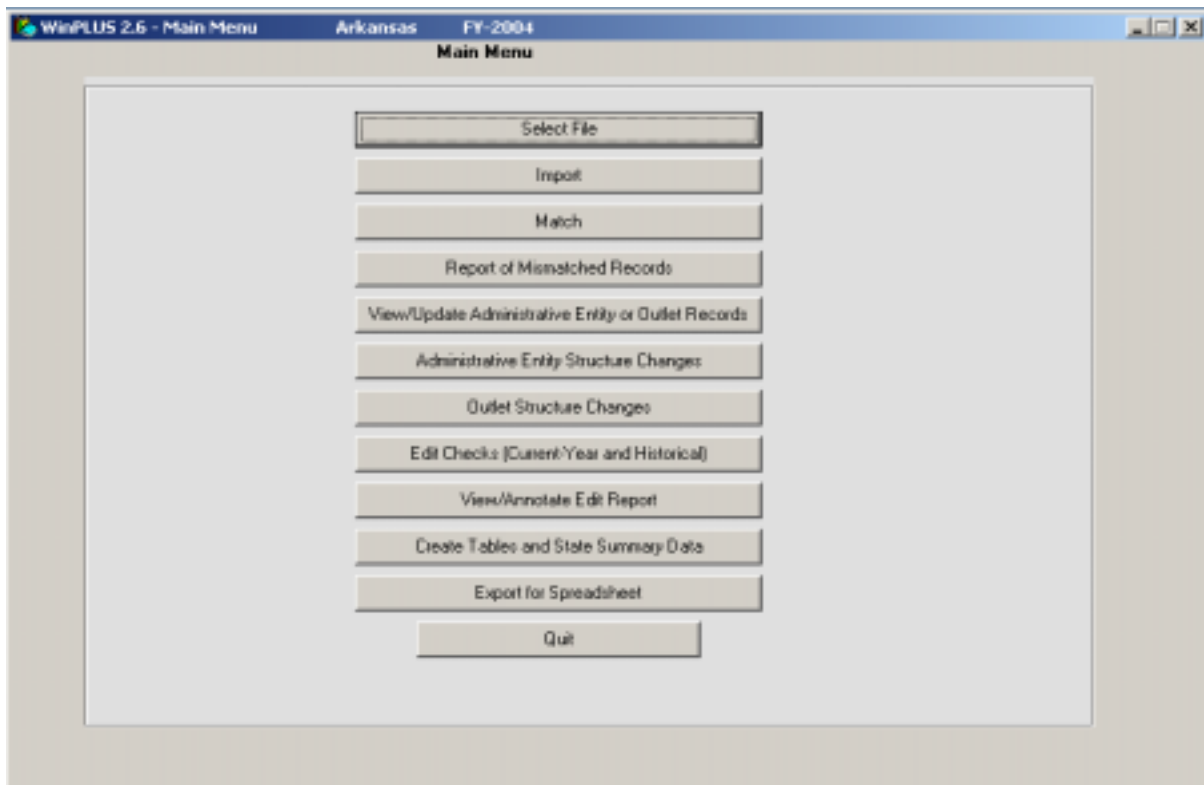## 5   WinPLUS MAIN MENU OPTIONS

After the user selects the current-year data file and enters the state characteristics data, WinPLUS automatically displays the Main Menu that has 12 options, as shown below. From the WinPLUS Main Menu, the user can select any of the menu items by clicking on the option. Each of these options is discussed in detail on the following pages.

5.1   Select File

WinPLUS automatically enters this function when starting up (see section 4.2—Select Data File). You will only need to use this option if you wish to select a different data file than the one you selected when you started WinPLUS, or if you wish to access the state characteristics data (reporting period starting and ending dates, official state population estimate, and total unduplicated population of legal service areas).

From the 'Select File' screen, you may select 'Process Current Year' or 'View Prior Year Data'. The database is listed under 'Select A File to Open' and is named **fscs_XX_FYZZZZ.mdb**, where 'XX' is your two-letter state abbreviation, 'FY' is fiscal year, and 'ZZZZ' is the ending year of the fiscal reporting period—2004 for the current data collection. After selecting a file, choose 'Open'.

When you are ready to enter your current-year data, you may use one of two methods: direct data entry via the keyboard, or data import from an external file. Select 'View/Update Administrative Entity or Outlet Records' from the WinPLUS Main Menu to enter your data directly (see section 5.5— View/Update Administrative Entity or Outlet Records for instructions). Select 'Import' from the WinPLUS Main Menu to import your data (see section 5.2—Import for instructions).

5.2   Import

5.2.1   Overview of Import

WinPLUS performs an automatic "Read and Validate" routine (discussed in section 5.2.3) during the import process to make sure the data are formatted correctly. The user cannot make changes to the data during this routine. Import files must conform exactly to the specifications provided in 'Appendix B— Administrative Entity Import File Specifications' and 'Appendix C—Outlet Import File Specifications'.

Note:

- All import file columns with a width of one or greater must have a valid entry. Use a -1 if you do not know the answer for an item.

- The administrative entity import file can contain only administrative entity records. Outlet records must be removed.

- The outlet import file can contain only outlet records—all central, branches, bookmobiles, and books-by-mail only outlets. Administrative entity records must be removed.

If you are unable to import successfully, please contact the PLS Census staff by phone at (800) 451-6235 or by e-mail at **govs.pls@census.gov**. Please keep a copy of the original import file for Census to review.

5.2.2   Selecting the Type of File to Import

Administrative entity and outlet data files can be imported into WinPLUS. WinPLUS imports them in sequence, not simultaneously. To initiate an import, choose 'Import' from the WinPLUS Main Menu. A screen asking the user to select the type of file to import is displayed:
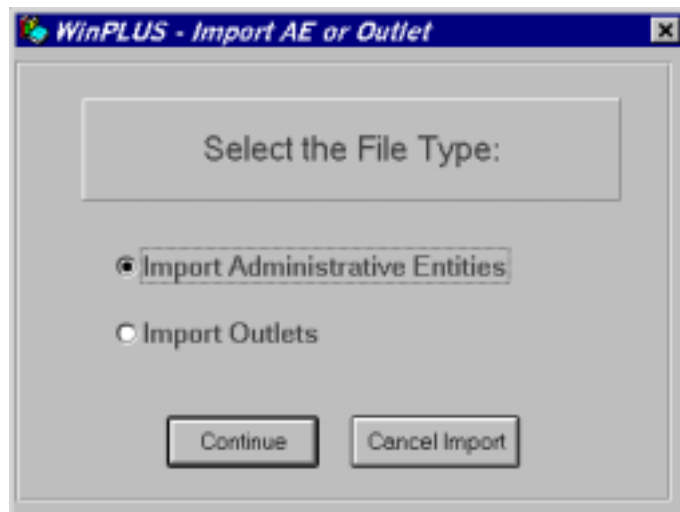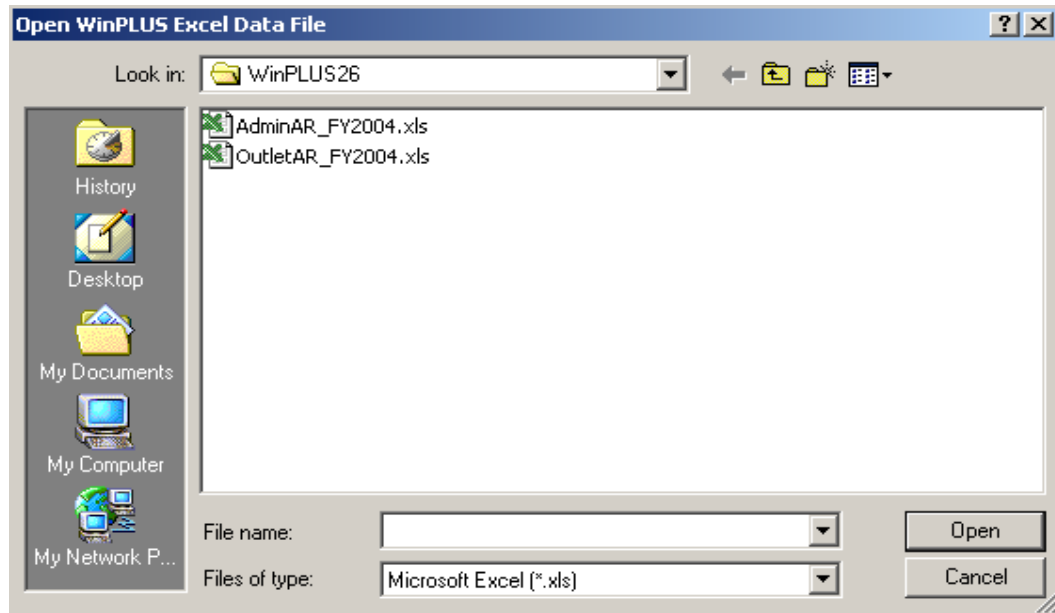

Choose 'Import Administrative Entities' or 'Import Outlets' depending on the type of data you plan to import. Choose 'Continue' to start the import process. To return to the WinPLUS Main Menu, choose 'Cancel Import'.

If you are importing the data for administrative entities, a menu (see screen below) is displayed with two available file formats: 'Text File' and 'Microsoft Excel Spreadsheet'. Select the file type that you will import into WinPLUS and choose 'Continue' to proceed with import, or choose 'Cancel Import' to return to the WinPLUS Main Menu.

If you are importing the data for outlets, the only option is 'Text File' (i.e., ASCII flat file). See the section below entitled 'Using the Macro Facility to Convert (Export) Excel Spreadsheet to Text File' if you need to convert an outlet Excel spreadsheet to a text file that you can import into WinPLUS.

Note:
- When importing an Excel spreadsheet, you must have a row of labels at the top of the spreadsheet. Otherwise, you will lose one data record because the first row gets dropped during import.

- All import file columns with a width of one or greater must have a valid entry. Use a -1 if you do not know the answer for an item.
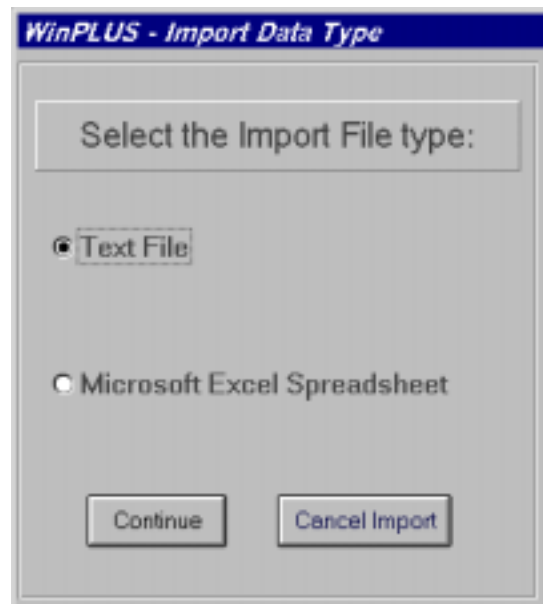
Using the Macro Facility to Convert (Export) Excel Spreadsheet to Text File

If you maintain your outlet file in an Excel spreadsheet, use the macro (WinPLUS_Macro.xls) provided with the WinPLUS installation package to create an ASCII flat (text) file from your Excel spreadsheet. Please follow these steps:

- Open the macro (WinPLUS_Macro.xls), located in the same directory as the WinPLUS software, and choose <u>E</u>nable Macros.
- Open the spreadsheet containing data to be converted (exported) to a text file. (The file must be open.)
- Select <u>T</u>ools, <u>M</u>acro, and <u>M</u>acros… to see a dialog box containing the macro named 'WinPLUS_Macro.xls!Export_Outlets'.
- Highlight the macro name (WinPLUS_Macro.xls) and click on '<u>R</u>un' to start the macro.
- Navigate through the message boxes until you reach the final one that tells you the name of the text file just created. Import this text file into WinPLUS.

5.2.3 Read and Validate

After the user selects the data file type and format, WinPLUS will display a screen from which the drive and the file to be imported can be selected.


If you are importing administrative entities using an Excel spreadsheet, WinPLUS will ask you to enter the worksheet name. If your spreadsheet contains more than one worksheet, a list of all worksheet names will appear and the user must select the one to import.
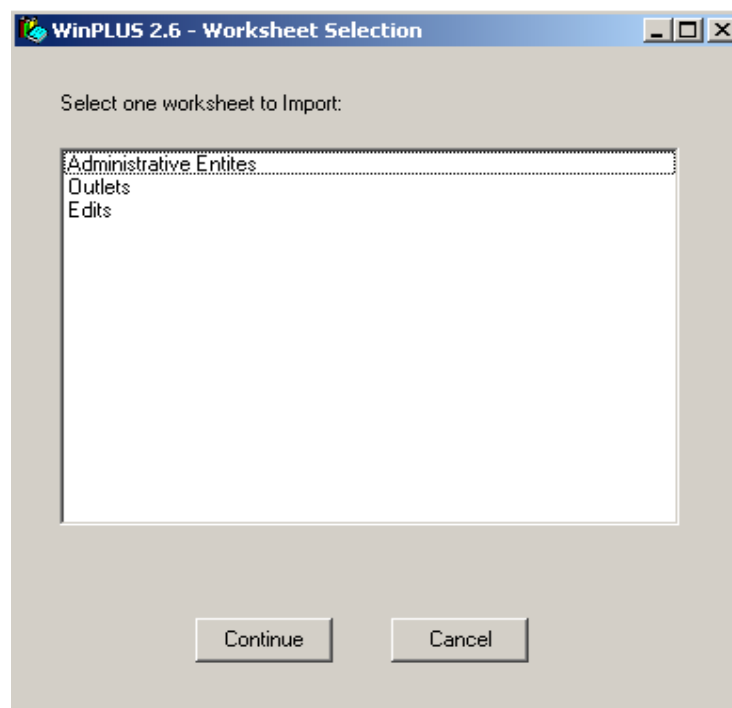
After the user has selected the type and format of file to import, the import begins. First, WinPLUS automatically opens the import file and 'reads' (copies) the data within it to a temporary WinPLUS table.

For Excel files, WinPLUS checks the first row of the spreadsheet for column headings. If the first field does not contain 'LIBID', 'LIB ID', or 'LIB_ID' a message box will appear asking the user whether the first row is a heading row. Select 'Yes' if it is or 'No' if it is not and the import will continue.
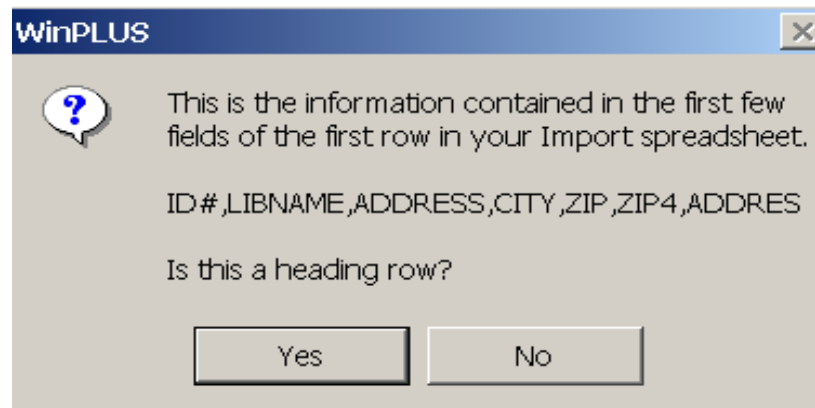
For ASCII text files, WinPLUS validates the data against the administrative entity import file specifications or the outlet import file specifications (see appendix B or C, respectively). While reading and/or validating the import file, WinPLUS will display the message "Reading Rec #…" showing WinPLUS's progress.

5.2.4 Import Complete

At the completion of importing, you have the option of (1) continuing with the matching routine, which matches current-year records against prior-year records, or (2) returning to the Main Menu and running the matching routine later. Select 'Yes' to continue with matching or 'No' to return to the Main Menu.
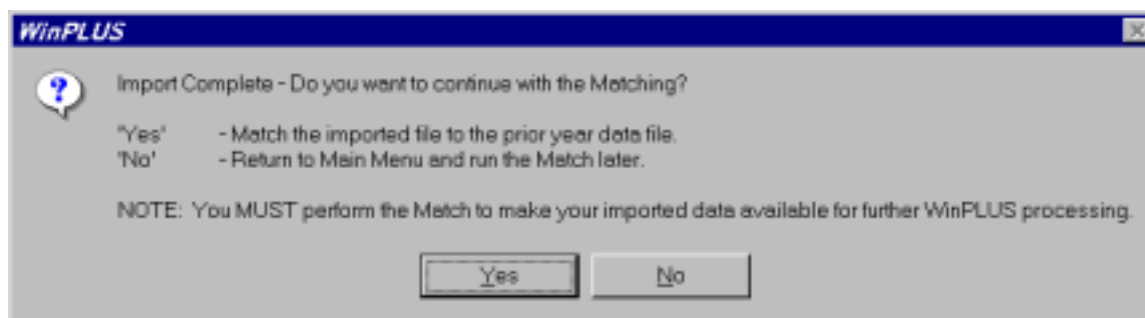
5.3   Match (Used with Imported Data Only)

The 'Match' option, which follows the 'Read and Validate' import routine, attempts to match records from the current-year import file against records from the prior-year file. The 'Match' option is used with imported data only. If you did not run the Matching Routine at the completion of importing your data, you must run it via the 'Match' option on the Main Menu. Please note the following:

- The 'Match' option on the Main Menu will not run if: (1) you did not import your data (i.e., you performed direct data entry), or (2) your data were not imported successfully. In either case, you will receive the following message if you select the 'Match' option on the Main Menu:
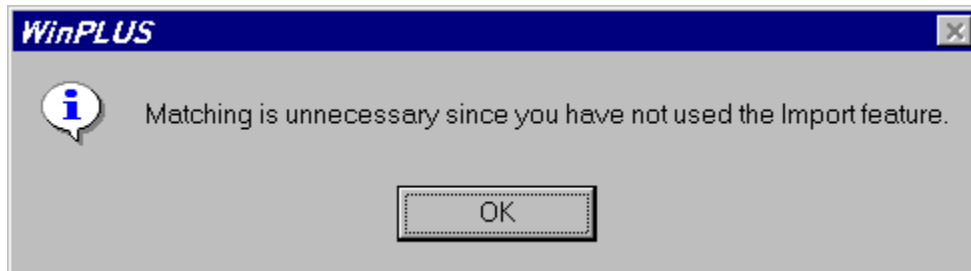
- The 'Edit Checks (Current Year and Historical)' option on the Main Menu will not run if you imported data but did not run the matching routine. If you try to run the edit checks, you will receive a message prompting you to run the "Match" feature:

- If you select the 'Match' option from the Main Menu, you will be prompted to begin matching on administrative entities (A) or outlets (O). **To complete the matching process, you must match on administrative entities (A) and on outlets (O).**

- You do not need to complete the Matching Routine in one session, but <u>you must complete it before proceeding with any other WinPLUS operations</u>.

5.3.1   Matching Routine

This routine attempts to match records from the current-year import file against records from the prior-year file. The 'Match' feature consists of the following steps:

1. Key information (e.g., NAME, LIB ID#, etc.) from the prior-year data is compared to the import data to check for all *automatic matches* first*,* and then to check for all *conditional matches*;

2. WinPLUS records official name and address changes;

3. WinPLUS runs the 'Structure Change' routine. This allows the user to resolve any records on the import file that have not been matched to the prior-year file and any records on the prior-year file that have not been matched to the import file; and

4. Matched records are moved to the administrative entity or outlet database.

The Matching Routine for Administrative Entity import files and Outlet import files are discussed separately in the next two sections.

5.3.1.1   Matching Routine for the Administrative Entity File

1. <u>Automatic match</u>. The following conditions constitute an automatic match of administrative entity records on the import file and the prior-year file:

   ➢ WinPLUS checks records to see if the LIB ID# and NAME (of library) on the import file exactly match the data on the prior-year file. If *both match*, the records are considered an automatic match, and the FSCS ID# is used.

   ➢ If WinPLUS can match *only one* of these data elements on the import file and the prior-year file, the matching routine also attempts to match *any two* of the following data elements: ADDRESS, CITY, ZIP, or PHONE. If this condition is met, the record is considered an automatic match.

2. <u>Conditional match</u>. A match on *only one* of the six data elements described above constitutes a conditional match.

The criteria for automatic and conditional matches are summarized below:

DATA MATCHING ACTION	LIB ID#	NAME (of Library)	ADDRESS, CITY, ZIP, PHONE
Automatic Match	Yes	Yes	None
	Yes	No	Any 2 of the 4
	No	Yes	Any 2 of the 4
Conditional Match (WinPLUS prompts user for match)	Yes	No	None or any 1 of the 4
	No	Yes	None or any 1 of the 4
	No	No	Any 1 of the 4

In a conditional match, WinPLUS displays both administrative entity records on a 'split-screen' and prompts the user to confirm whether there is a specific library record match. In the following example, the LIB ID# and only one of the other four variables match, so this is a conditional match. (Note: The FSCS ID# is not displayed on the current-year side of the data matching screen, as it is considered premature to include it on the current-year record at this point.)

After a conditional match is found, the user clicks on 'Yes' to accept the match or 'No' to reject it. The record is then updated with the new information and WinPLUS moves on to the next record. Select 'Cancel' to return to the WinPLUS Main Menu.

Note: Be especially careful when importing data for new libraries that are really structure changes. For example, if two library systems merge and the administrative entity keeps the address of one of the old systems, WinPLUS may read this as a conditional match between the new entity on the import file and the old entity on the prior-year record.

The matching routine is **not** case sensitive. A library name entered in upper-case letters (e.g., 'MAIN LIBRARY') will be successfully matched with a library name entered in lower-case letters (e.g., 'Main Library').

Before continuing to the next record, WinPLUS checks for name and address changes from the prior-year record to the import record just matched (whether an automatic or conditional match).

5.3.1.2 Matching Routine for the Outlet File

1. <u>Automatic match</u>. The following conditions constitute an automatic match of outlet records on the import file and the prior-year file:

   ➢ WinPLUS checks records to see if the LIB ID#, NAME (of library), and Outlet Type Code on the import file exactly match the data on the prior-year file. If *all three match*, the records are considered an automatic match and the prior-year FSCS ID# is used.

   ➢ If WinPLUS can match *only two* of these data elements (the LIB ID# and Outlet Type Code), the matching routine also attempts to match *any two* of the following data elements: ADDRESS, CITY, ZIP, or PHONE. If this condition is met, the record is considered an automatic match.

   ➢ If WinPLUS can *only match* the NAME (of library) and Outlet Type Code, the matching routine also attempts to match *any two* of the following data elements: ADDRESS, CITY, ZIP, or PHONE. If this condition is met, the record is considered an automatic match.

2. <u>Conditional match</u>. A match on *only one* of the six data elements described above constitutes a conditional match. The Outlet Type Code is not used for a conditional match.

   The criteria for automatic and conditional matches are summarized below:

DATA MATCHING ACTION	LIB ID#	NAME (of Library)	OUTLET TYPE	ADDRESS, CITY, ZIP, PHONE
Automatic Match	Yes	Yes	Yes	None
	Yes	No	Yes	Any 2 of the 4
	No	Yes	Yes	Any 2 of the 4
Conditional Match (WinPLUS prompts user for match)	Yes	No	N/A	None or any 1 of the 4
	No	Yes	N/A	None or any 1 of the 4
	No	No	N/A	Any 1 of the 4

In a conditional match, WinPLUS displays both outlet records on a 'split-screen' and prompts the user to confirm whether there is a specific library record match. In the following example, the LIB ID# matches, so this is a conditional match. (Note: The FSCS ID# is not displayed on the current-year side of the data matching screen, as it is considered premature to include it on the current-year record at this point.)

After a conditional match is found, the user clicks on 'Yes' to accept the match or 'No' to reject it.. The record is then updated with the new information and WinPLUS moves on to the next record. Select 'Cancel' to return to the WinPLUS Main Menu.

Be especially careful when importing data for new libraries that are really structure changes. For example, if two library systems merge and the administrative entity keeps the address of one of the old systems, WinPLUS may read this as a conditional match between the new entity on the import file and the old entity on the prior-year record.

Note: The data matching routine is **not** case sensitive. For example, a library name entered in upper-case letters (e.g., 'MAIN LIBRARY') will be successfully matched with a library name entered in lower-case letters (e.g., 'Main Library').

Before continuing to the next record, WinPLUS checks for name and address changes from the prior-year record to the import record just matched (whether an automatic or conditional match).

5.3.2   Checking for Name and Address Changes

While in the data Matching Routine, WinPLUS automatically checks for name and/or address changes so that the change can be tracked in the historical file if appropriate.

Name (of library) Change. When a user updates a name in an import record, the 'Import Name Change' window is automatically displayed below the split screen showing the import and prior-year data.

- Type '1', then select 'OK' to select "This Administrative Entity has officially changed its name" when the library name was officially changed.

- The user is prompted "Is this a Structure Change (Y/N)?" (The types of administrative entity structure changes are listed in the WinPLUS screen on page 26. Outlet structure changes are listed in the screen on page 37.) Type 'N' to simply track the name change in the historical changes database. Type 'Y' to confirm that the record will need a structure change.

- Type '2', then select 'OK' to select "This is now the preferred spelling of the Name." when a correction was made to the library name because of a data entry error.

- Type '3', then select 'OK' to select "Last year's Name should be used instead of this year's." if you want to keep the prior-year name.

  WinPLUS then automatically checks for address changes for the same record.

Address Change. When the user updates an address in an import record, the 'Import Address Change' window is automatically displayed below the split screen showing the import and prior-year data. Select one of the three options displayed.

- Type '1', then select 'OK' to select "This Administrative Entity has moved to a new location." when the library moves its physical location.

- The user is prompted "Is this a Structure Change (Y/N)?" (The types of administrative entity structure changes are listed in screen on page 26. Outlet structure changes are listed on page 37.) Type 'N' to simply track the address change in the historical changes database. Type 'Y' to confirm that the record will need a structure change.

- Type '2', then select 'OK' to select "This is now the preferred Street Address (same location)." when a correction was made to the library address because of a data entry error.

- Type '3', then select 'OK' to select "Last year's Street Address should be used instead of this year's." if you want to keep the original address.

After all matches are complete and name and address changes checked, WinPLUS begins the structure change routine.

5.3.3   Structure Change Routine

After all matches are complete and official name and address changes recorded, if one or more records from the administrative entity or outlet import file still is not matched to the previous year's file, WinPLUS automatically begins the structure change routine. **Note: You cannot make more than nine structure changes during a single WinPLUS session. To make more than nine structure changes, 'Quit' and restart WinPLUS.**
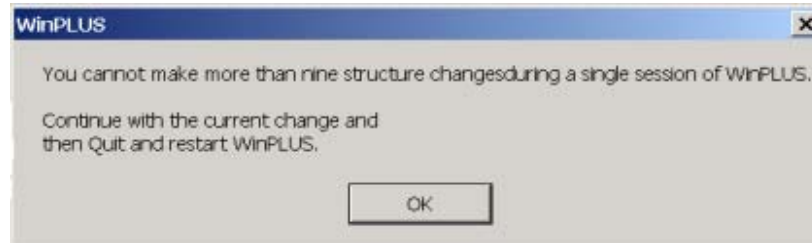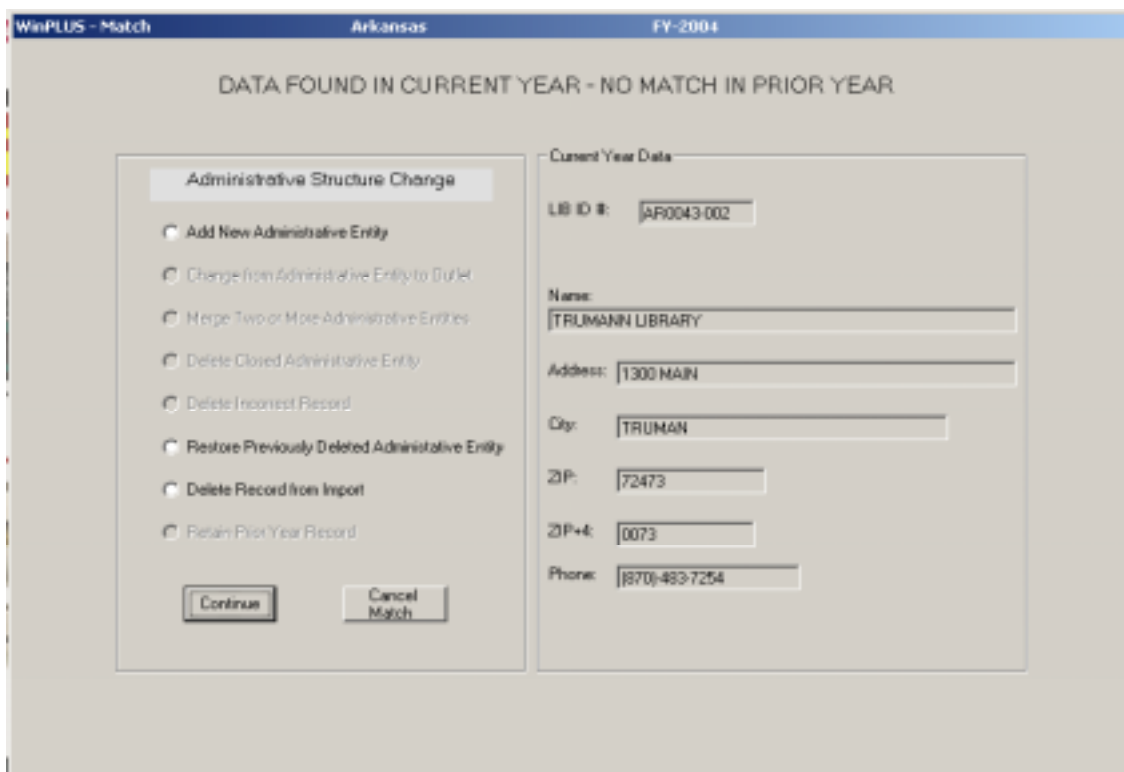
ADMINISTRATIVE ENTITY STRUCTURE CHANGES DURING MATCHING ROUTINE

An 'Administrative Structure Change' menu with several options is automatically displayed if one or more records from the administrative entity import file are not matched to the prior-year file. These options will vary depending on the type of match found. The options are described below.

1.   <u>DATA FOUND IN CURRENT YEAR – NO MATCH IN PRIOR YEAR</u>

When data are found in the administrative entity import file, but no match is found in the prior-year file, three types of structure changes are available: Add a new administrative entity, restore a previously deleted administrative entity, or delete the record from import.

➢ **Add New Administrative Entity**

      To add a completely new administrative entity record, select 'Add New Administrative Entity' from the 'Administrative Structure Change' menu and then select 'Continue'. The program assigns the new entity a new FSCS ID#. Click 'OK' to continue to the next structure change.

WinPLUS - Administrative Structure Changes   Arkansas   FY-2004
Add new Administrative Entity

WinPLUS ☒

Add completed.

[OK]
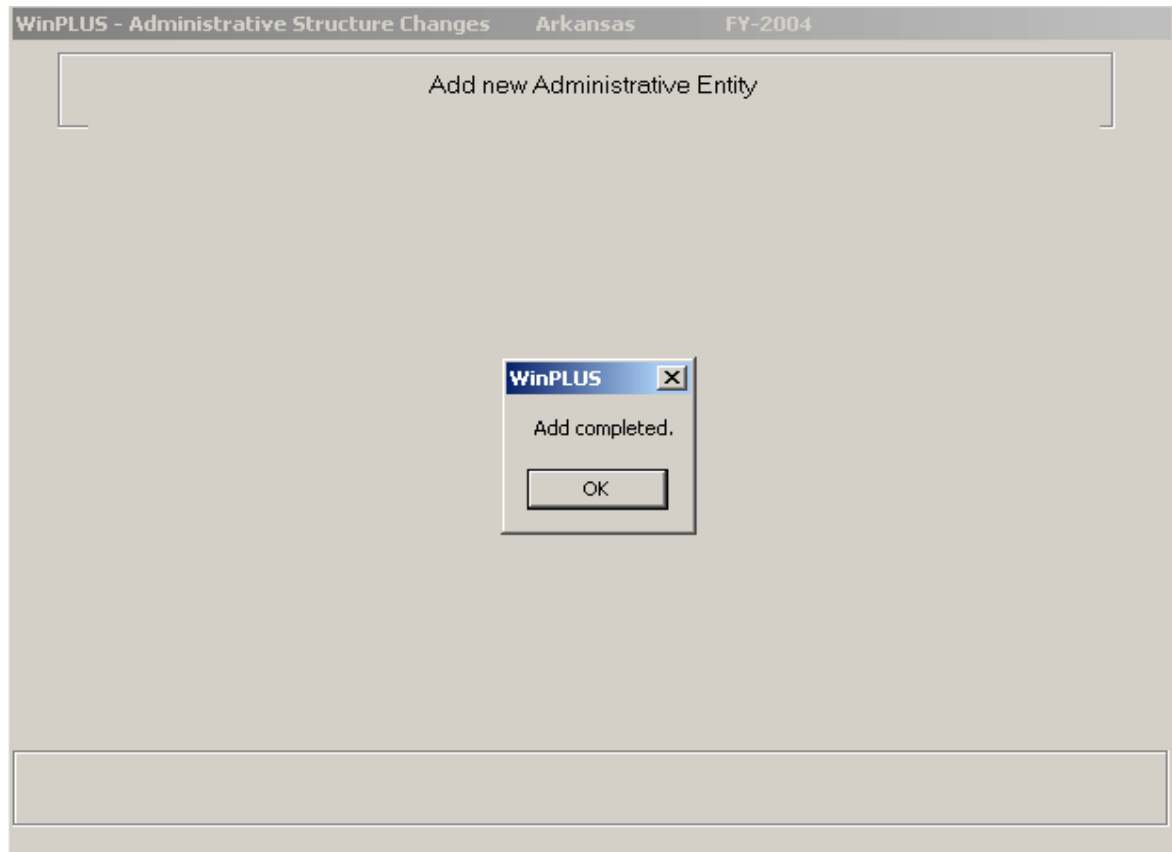
➢ **Restore Previously Deleted Administrative Entity**

To restore an administrative entity record, choose 'Restore Previously Deleted Administrative Entity' from the 'Administrative Structure Change' menu. (Note: The deleted record is restored from the historical database and becomes a current record under its original FSCS ID#.)

Choose the administrative entity to restore from the list of administrative entities by clicking on the gray box to the left of the name. *The entire row must be highlighted.* Please be sure to pick the administrative entity that you have been working with in the match. Choose 'Restore'.

The historical database only restores data for data elements 1 through 19. Enter the data for the remaining items now or later via the WinPLUS Main Menu option 'View/Update Administrative Entity or Outlet Records'. Select 'Save Now' or 'Exit' to save the changes or 'Cancel Restore' to cancel the procedure.

➢ **Delete Record from Import**

This option allows the user to 'bail out' of importing a record that does not match the user's current-year template file. Canceling a record from import allows the import to proceed, but the original record is still in the import file. The user must edit the record, make a structure change, or correct an error. Otherwise the user will have to cancel the same record each time an import is performed. Select 'Delete Record from Import' from the 'Administrative Structure Change' menu and then choose 'Continue' to 'bail out' of importing a record. The program will automatically resume processing the next import file structure change.

2. <u>DATA FOUND IN PRIOR YEAR – NO MATCH IN CURRENT YEAR</u>

When data are found in the prior-year file, but a match is not found in the administrative entity import file, five types of structure changes are available: Change from an administrative entity to an outlet, merge two or more administrative entities, deleted a closed administrative entity, delete an incorrect record, or retain the prior-year record.

> ➢ **Change from Administrative Entity to Outlet**

       To change an administrative entity record to an outlet record, select 'Change from Administrative Entity to Outlet' from the 'Administrative Structure Change' menu. The administrative entity that changed to an outlet is tracked in the historical database under its original FSCS ID# and the new outlet's FSCS ID#.

       You will receive the message 'Change this Administrative Entity to an Outlet?' Select 'Yes' to change the administrative entity to an outlet. Select 'No' to cancel the structure change.

If you select 'Yes' and outlets exist for the administrative entity selected to change to an outlet, you are prompted with the message 'Outlets exist. You must first delete all outlets associated with this Entity.' The structure change is canceled. You must reconcile the outlets before the administrative entity can be changed to an outlet. This is because outlets must be attached to an administrative entity. To reconcile the outlets, return to the WinPLUS Main Menu and then select option 'Outlet Structure Changes' and follow instructions in section 5.7—Outlet Structure Changes. After all outlets have been reconciled, return to WinPLUS Main Menu option 'Administrative Entity Structure Changes'. Follow the instructions for 'Change from Administrative Entity to Outlet'.

If you select 'Yes' and all outlets are reconciled, you will be asked, 'Select an Administrative Entity to be the parent record for this Administrative Entity that you are changing to an Outlet'. Select the administrative entity that will become the parent record by clicking on the gray box to the left of the names. *The entire row must be highlighted*. Select 'Continue' to complete the structure change.

You must enter data for the new outlet for data elements #9-Outlet Type Code, #10-Metropolitan Status Code, #11-Square Footage of Outlet (if the outlet type code is CE or BR), and #12-Number of Bookmobiles. Use WinPLUS Main Menu option 'View/Update Administrative Entity and Outlet Records' for data entry.

➢   **Merge Two or more Administrative Entities**

        To merge administrative entity records, select 'Merge Two or More Administrative Entities' from the 'Administrative Structure Change' menu, and select 'OK' to continue. (Note: WinPLUS automatically assigns the new administrative entity a new FSCS ID#. The number assigned is the next highest FSCS ID# from the one previously assigned. All centrals, branches, and bookmobiles are carried over to the new administrative entity record. The old administrative entities that merged are tracked in the historical database under their old and new FSCS ID #s.)

        Next, select the administrative entities to be merged by clicking on the gray box to the left of the names. *The entire row must be highlighted*. Please be sure that the record with no match in the current year (that you are working on) is one of you selections.

You will then receive the message 'Do you want to carry over one of the Administrative Entities?' If you select 'Yes', you are prompted to 'Select Administrative Entity to carry over'. Select the administrative entity to carry over by clicking on the gray box to the left of the name. *The entire row must be highlighted.*
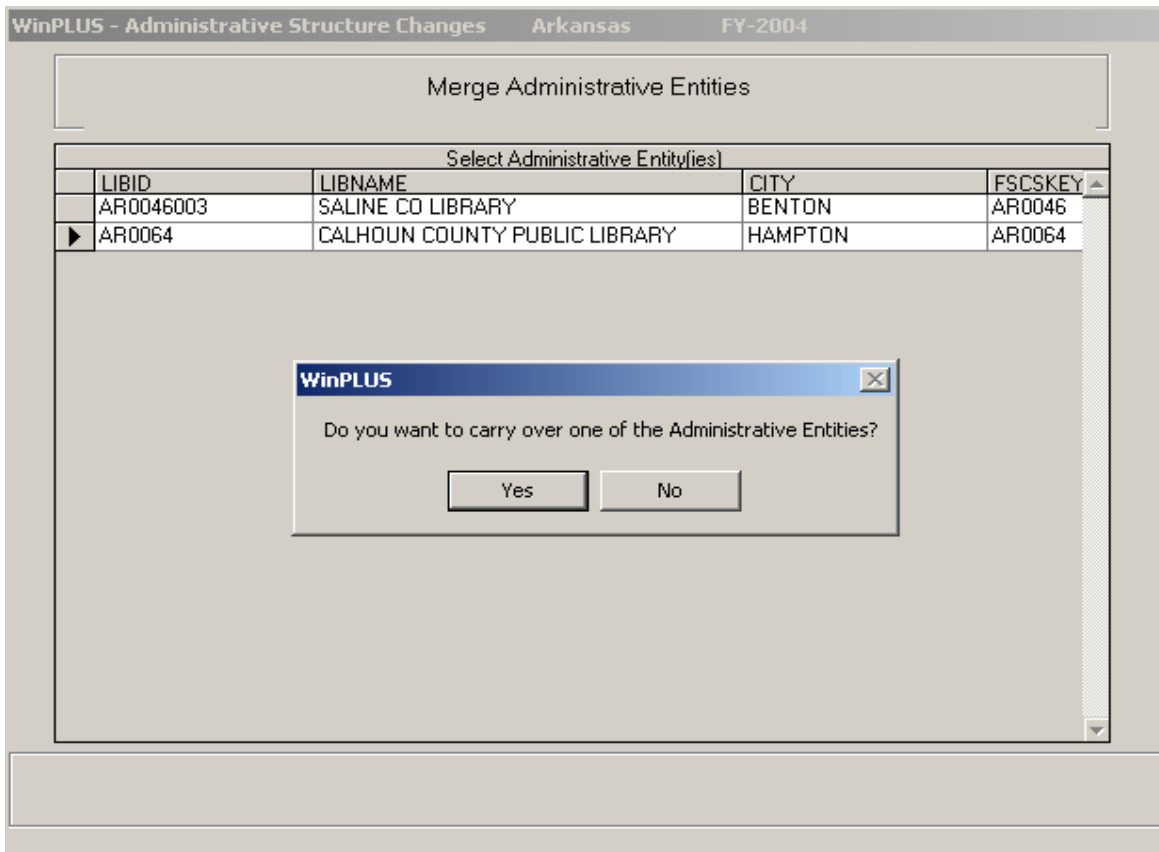
The name and address information for the entity you selected will carry over to the new entity. If you select 'No', these items are left blank for you to fill in the new information.

➢ __Delete Closed Administrative Entity__

To delete an administrative entity that has closed, choose 'Delete Closed Administrative Entity' from the 'Administrative Structure Change' menu and select 'Continue'. (Note: The closed administrative entity record is deleted from the administrative entity file, but is automatically tracked in the historical database under its original FSCS ID# and can later be restored.)

The next screen asks 'Do you want to delete this Administrative Entity and all of its Outlets?'

Choose 'No' to cancel, or 'Yes' to delete the closed administrative entity.

__Note: If an administrative entity did not report any data this year but did not close or merge with another entity, please retain it on the file and enter –1 for the data elements.__

> ➢ **Delete Incorrect Record**

To delete an incorrect administrative entity, choose 'Delete Incorrect Record' from the 'Administrative Structure Change' menu and select 'Continue'. (Note: The deleted administrative entity is tracked in the historical database under its original FSCS ID# and can later be restored.)

Choose 'Yes' to delete, 'No' to cancel. If you choose 'Yes', you will receive the message 'Delete completed'.

Note: If an administrative entity did not report any data this year but did not close or merge with another entity, please retain it on the file and enter –1 for the data elements.

> ➢ **Retain Prior-Year Record**

This option allows the user to retain the prior-year data when a prior-year record is not matched on the current-year import file. Select 'Retain Prior Year Record' from the 'Administrative Structure Change' menu and then choose 'Continue' to retain the prior-year record. The program will automatically resume processing the next import file structure change.

OUTLET STRUCTURE CHANGES DURING MATCHING ROUTINE

An 'Outlet Structure Change' menu with several options is automatically displayed if one or more records from the outlet import file are not matched to the prior-year file. These options will vary depending on the type of match found. The options are described below.

1. DATA FOUND IN CURRENT YEAR – NO MATCH IN PRIOR YEAR

When data are found in the outlet import file, but no match is found in the prior-year file, three types of structure changes are available: add a new outlet, restore a previously deleted outlet, or delete the record from import.

➢ **Add New Outlet**

To add a completely new outlet record, select 'Add New Outlet' from the 'Outlet Structure Change' menu'. A window prompts the user to 'Select a parent Administrative Entity for this Outlet.'

Select the administrative entity that will be the parent to the outlet by clicking on the gray box to the left of the names. *The entire row must be highlighted.* Select 'Continue' to proceed. Next, the 'Add New Outlet' data entry screen window is displayed with the pop-up message 'Add Complete'.

WinPLUS assigns the new outlet an FSCS ID#. The number assigned is the same as the administrative entity to which the outlet was added, with the addition of a three-digit suffix to uniquely identify the new outlet.

➢ **Restore Previously Deleted Outlet**

To restore a previously deleted outlet, select 'Restore Previously Deleted Outlet' from the 'Outlet Structure Change' menu'. (Note: The deleted record is restored from the historical database and becomes a current record in the outlet database. The outlet's old FSCS ID# is retained.) A list of outlets that may be restored is displayed.

| WinPLUS - Outlet Structure Changes | Arkansas | FY-2004 |

Restore Outlet record

Select an Outlet to Restore

FSCS	LIBID	LIBNAME	CITY
AR0012	AR012	ARKANSAS RIVER VALLEY REC	DARDANELLE
AR0012	AR012-002	ARKANSAS RIVER VALLEY REC	DARDANELLE
AR0019	AR019-004	BRADFORD PUBLIC LIBRARY	BRADFORD
AR0010	AR010-006	BRADLEY PUBLIC LIBRARY	BRADLEY
AR0046	AR005-004	BRYANT BRANCH LIBRARY	BRYANT
AR0003	AR003-014	BULL SHOALS LIBRARY	BULL SHOALS
AR0005	AR005-007	CARTHAGE BRANCH LIBRARY	CARTHAGE
AR0001	AR0001-013	CENTRAL ARKANSAS LIBRARY	LITTLE ROCK
AR0001	AR001-008	CENTRAL ARKANSAS LIBRARY	LITTLE ROCK
AR0024	AR024-005	CHERRY VALLEY PUBLIC LIBRA	CHERRY VALLEY
AR0014	AR032-002	CHICOT COUNTY LIBRARY	LAKE VILLAGE
AR0063	AR010-011	CHIDESTER PUBLIC LIBRARY	CHIDESTER
AR0010	AR010-011	CHIDESTER PUBLIC LIBRARY	CHIDESTER
AR0036	AR036-002	CLEVELAND COUNTY LIBRARY	RISON
AR0010	AR010-003	CLOC REGIONAL LIBRARY	MAGNOLIA
AR0039	AR003-003	COLLEGE BRANCH LIBRARY	MOUNTAIN HOME
AR0010	AR010-013	COLUMBIA COUNTY PUBLIC LIE	MAGNOLIA
AR0045	AR0045-002	DECATUR PUBLIC LIBRARY	DECATUR

[Restore] [Cancel]

Select the outlet that will be restored by clicking on the gray box to the left of the names. *The entire row must be highlighted.* Please select the outlet record that you have been working with in the match. Select 'Restore' to proceed with the structure change.

Next, a window showing the outlet is displayed. The user will be asked 'Do you want to restore this Outlet?'

Select 'Yes' to continue with the restore. Select 'No' to cancel the restore and return to the 'Outlet Structure Change' menu'. When the user selects 'Yes', the outlet record is restored from the historical database and again becomes a part of the outlet database under its original FSCS ID#. The 'Outlet Structure Change' menu is then displayed.

➢   **Delete Record from Import**

This option allows the user to 'bail out' of importing a record that does not match the user's current-year template file. When 'Delete Record from Import' is selected, the record is not imported into the file, but the original record is still in the import file. Select 'Delete Record from Import' from the 'Outlet Structure Change' menu and then choose 'Continue' to 'bail out' of importing a record. The program will automatically resume processing the next import file structure change.

2. DATA FOUND IN PRIOR YEAR – NO MATCH IN CURRENT YEAR

When data are found in the prior-year file, but a match is not found in the outlet import file, five types of structure changes are available: move outlet to its own (newly created) administrative entity, merge two or more outlets, delete a closed outlet, delete an incorrect record, or retain the prior-year record.

➢ **Move Outlet to its Own (Newly Created) Administrative Entity**

To move an outlet record to a newly created administrative entity, select 'Move Outlet to its Own (Newly Created) Administrative Entity ' from the 'Outlet Structure Change' menu. The outlet that changed to an administrative entity is tracked in the historical database under its old FSCS ID# and the new FSCS ID#. The following screen is displayed.

        If you select 'Yes', the 'Move Outlet to Newly Created Administrative Entity' data entry screen is displayed. Please enter data for the newly created administrative entity. Select 'Save Now' or 'Exit' to save the new administrative entity record, or select 'Cancel Outlet Move' to cancel the structure change.

➢ **Merge Two or more Outlets**

To merge two or more outlets, select 'Merge Two or More Outlets' from the 'Outlet Structure Change' menu and select 'Continue'. (Note: WinPLUS automatically assigns the new outlet a new FSCS ID#. The old outlets that merged are tracked in the historical database under their old and new FSCS ID#s.) Next, you will be prompted to 'Select two or more Outlets to be Merged' from a list of all outlets.

Select the outlet records to be merged by clicking on the gray box to the left of the names. *The entire row must be highlighted.* Please be sure that one of your selections is the outlet record that has no match in the current year. If you select 'Continue' to proceed with the merge, a message will ask 'Do you want to carry over one of the outlets?'

If you choose 'Yes', you will be prompted to 'Select Outlet to carry over'. (Note: Information from this outlet will be inserted in the newly merged outlet.)

After you select the outlet to carry over, a list of all administrative entities is displayed with the message 'Select a parent Administrative Entity for this Outlet.' Select the administrative entity for the new outlet by clicking on the gray box to the left of the names. *The entire row must be highlighted*.

The 'Merge Outlet' data entry screen will be displayed for the newly merged outlet. Please enter any missing data for the newly merged outlet, and then select 'Save Now' or 'Exit' to save the new outlet record, or select 'Cancel Merge' to cancel the structure change and return to the 'Outlet Structure Change' menu.

> **Delete Closed Outlet**

To delete a closed outlet, select 'Delete Closed Outlet' from the 'Outlet Structure Change' menu and select 'Continue'. Select 'Yes' to delete the closed outlet, or 'No' to return to the 'Outlet Structure Change' menu. If you choose 'Yes', the closed outlet record is deleted, tracked in the historical database under its original FSCS ID#, and can later be restored.)

Note: If an outlet closes temporarily, the user should:

1. Delete the closed outlet from the file using the 'Delete Closed Outlet' option from the 'Outlet Structure Change' menu.

2. When the outlet reopens, restore it using the 'Restore Previously Deleted Outlet' option from the 'Outlet Structure Change' menu.

Note: If an outlet did not report any data this year but did not close or merge with another outlet, please retain it on the file and enter –1 for the data elements.

➢ **Delete Incorrect Record**

To delete an incorrect outlet record, select 'Delete Incorrect Record' from the 'Outlet Structure Change' menu. Next, a 'Delete incorrect Outlet record' data entry screen is displayed with the message 'Do you want to delete this Outlet?'

Select 'Yes' to confirm the deletion, or select 'No' to cancel the structure change.

Note: If an outlet did not report any data this year but did not close or merge with another outlet, please retain it on the file and enter –1 for the data elements.

➢ **Retain Prior Year Record**

This option allows the user to keep the prior-year data for a record that is not matched on the current-year import file. Select 'Retain Prior Year Record' from the 'Outlet Structure Change' menu and then choose 'Continue' to retain the prior-year record.

5.4   Report of Mismatched Records

After completion of data entry (by import or keyboard), the user should select 'Report of Mismatched Records' from the WinPLUS Main Menu to generate a report of prior-year administrative entity records (FY 2003 file) that do not match (on FSCS ID#) current-year records (FY 2004 file). These mismatches should have been resolved by either deletions, closings, merges, or changes from administrative entities to outlets. The user should review this list for accuracy. A sample report is displayed below:
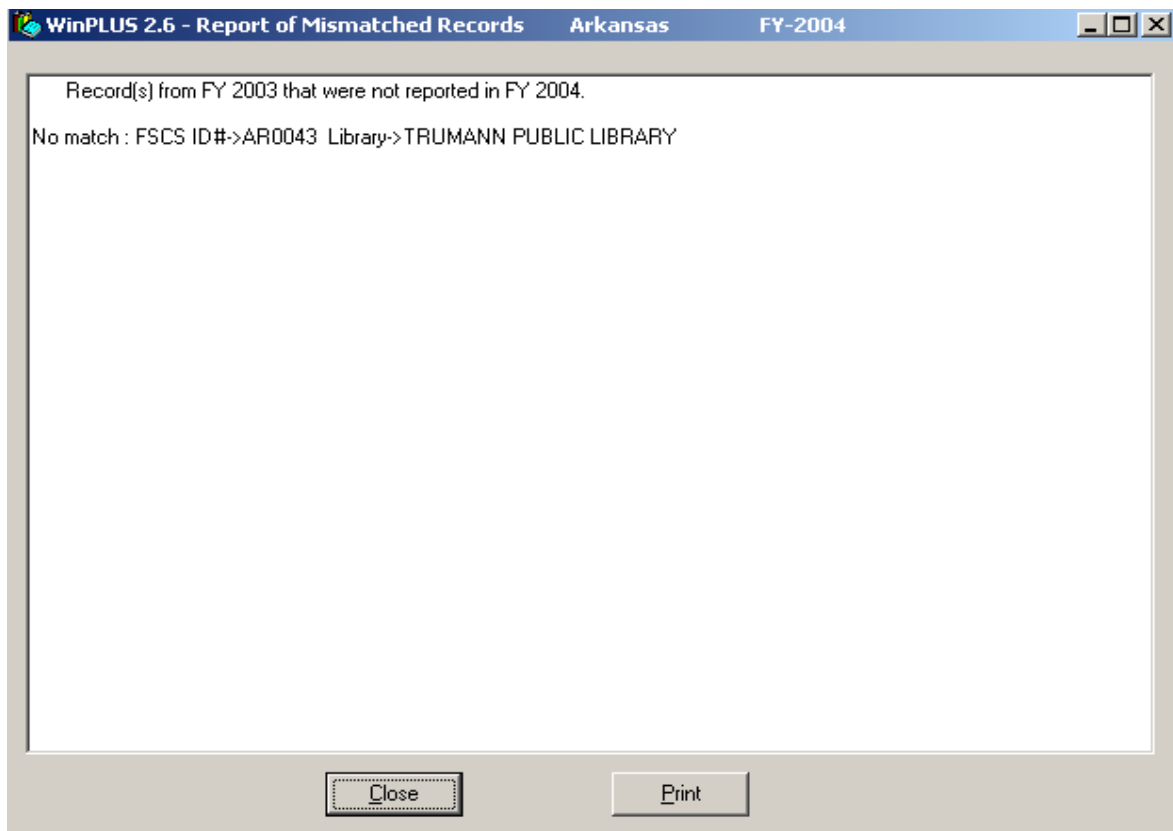
Choose 'Print' to print the report. Choose 'Close' to return to the WinPLUS Main Menu.

5.5   View/Update Administrative Entity or Outlet Records

This function is used to view <u>existing</u> administrative entity and outlet records, or to make changes to these records through keyboard data entry**.**

5.5.1   Keyboard and Function Keys for View/Update Records

5.5.1.1   Keyboard Keys. WinPLUS allows the use of the following keyboard keys during data entry   to view/update records:

<Enter> or <Tab>	Accepts data that the user has just typed for the current data element and moves forward to the next data element.
<PgUp>	When applicable, accepts data that the user has just typed for the current data element and moves backward one page or screen to the previous screen.
<PgDn>	When applicable, accepts data that the user has just typed for the current data element and moves forward one page or screen.

5.5.1.2   Function Keys. The Function keys shown below are usually found to the far left or along the top of the keyboard. Marked F1, F2, etc, they are used to execute WinPLUS commands when the user is viewing or updating administrative entities or outlets.

<F1> Help	Displays the definition for a data element while on the data field. Select <Esc> to exit the definition.
<F2> Sort By	Sorts by Name, LIB ID, FSCS ID, or City.
<F3> Outlets	Displays the outlet(s) affiliated with the administrative entity.
<F4> Structure Changes	Opens the Structure Change menu.
<F5> Save Work	Saves the current record to the hard disk.
<F6> Outlet Retrieval List	Displays the Outlet Retrieval List.
<F7> Edit Check	Runs edit checks on the current record.
<F8> Cancel Changes	Cancels unsaved changes to the current record.
<F9> Previous Record	Moves to the previous record.
<F11> Next Record	Moves to the next record.
<CTRL><P>	Prints the current record.
<CTRL><R>	Replicates the administrative.
<CTRL><T>	Re-totals the administrative entity total fields.
<CTRL><X>	Exits the current record and returns to the WinPLUS Main Menu.

5.5.1.3   Menus

You can move around in WinPLUS by clicking with your mouse, or by using the <TAB> or <ENTER> key. Use the menu choices (File, Edit, View, and Help) at the top of your screen to do specific activities in 'View/Update Administrative Entity or Outlet Records'.

5.5.2 View/Update Administrative Entity Records

To view administrative entity or outlet records, or to make changes to these records through keyboard data entry, select WinPLUS Main Menu option 'View/Update Administrative or Outlet Records'. Each administrative entity record consists of three data entry screens. The top of each screen displays the entity's LIB ID, library name, FSCS ID, and City, for easy identification. Page 1 displays data elements 1 through 29.

Use the 'Enter' and 'Tab' keys to move from field to field on the data entry screen. When data are entered in the last field of the first and second screens, the cursor moves to the next screen. The user can move from screen to screen of the current administrative entity using the 'Previous Page' and 'Next Page' keys at the bottom of the screen, or the 'Page Up' and 'Page Down' keys. Save changes by choosing the 'Save Work' or 'Exit' keys. To cancel the changes prior to saving, select 'Cancel Changes'.

The user can move among different administrative entities by using the "Navigate Records" arrows at the bottom of the screen or the <F9> and <F11> function keys. Note that pressing <F9>, <F11>, or the "Navigate Records" arrows will also save the current record.

When the user selects 'Next Page', page 2 is opened, displaying data elements 30 through 56.

When 'Next Page' is selected again, page 3 is opened, displaying data elements 57 through 69.

To access administrative entity records by LIB ID, FSCS ID, Name, or City, use the drop-down boxes attached to these data elements to select the desired entity. The FSCS ID drop-down box is displayed below:

Drop-down boxes are also included on page 1 for Interlibrary Relationship Code, Legal Basis Code, Administrative Structure Code, FSCS Public Library Definition, Geographic Code, and Legal Service Area Boundary Change. The drop-down box for FSCS Public Library Definition is displayed below.

Name or Address (of library) Change

When the user updates the Name or Address (of library) data element for the administrative entity under 'View/Update Administrative Entity or Outlet Records', the 'Name/Address Change Menu' window is automatically displayed. WinPLUS prompts the user for more information so that the name/address change can be tracked in the historical file, if appropriate.

The choices for a change in the name of a library are:

1. This Administrative Entity has officially changed its Name.
2. This is the preferred spelling of the Name.

The choices for a change in the street address are:

1. This Administrative Entity has moved to a new location.
2. This is the preferred Street Address.

If the user chooses the first option in either case, they are asked 'Has there been an organizational Structure Change?' If 'Yes' is selected, WinPLUS prompts the user to make the structure change via the 'Administrative Entity Structure Changes' option on the WinPLUS Main Menu (see Section 5.6). (The structure change can also be made via the 'Structure Changes' button at the bottom of the administrative entity screen.) If 'No' is selected, WinPLUS simply tracks the change in the historical database and the address/name change is saved to the database.

5.5.3   View/Update Outlet Records

Outlets can also be accessed from the WinPLUS Main Menu option 'View/Update Administrative Entity or Outlet Records'. *Outlets of the current administrative entity* are displayed via the <F3> function key; by selecting 'View', then 'Outlet' from the menu bar at the top of the screen; or by selecting the 'View Outlet' button at the bottom of the administrative entity screen. (Repeat your selection to deselect it.) *All outlets for your state* are displayed via the <F6> function key, or by selecting 'View', then 'Outlet Retrieval List' from the menu bar. The user can scroll down the list to choose an outlet. While the list is visible, select the outlet that you would like to view/update and then select 'Enter'. An outlet screen is shown below:

On the outlet screen, the LIB ID and 'Select Affiliated Outlet' items have drop-down boxes that allow the user to move from one outlet to another outlet of the same administrative entity. The drop-down box for LIBID on the outlet screen is displayed below:

Name or Address (of library) Change

When the user updates the Name or Address (of library) data element for the outlet under 'View/Update Administrative Entity or Outlet Records', the 'Name/Address Change Menu' is automatically displayed. WinPLUS prompts the user for more information so that the name/address change can be tracked in the historical file, if appropriate.

The choices for a change in the name of a library are:

1. This Outlet had officially changed its Name.
2. This is the preferred spelling of the Name.

The choices for a change in the street address are:

1. This Outlet has moved to a new location.
2. This is the preferred Street Address.

If the user chooses the first option in either case, they are asked 'Has there been an organizational Structure Change?' If 'Yes' is selected, WinPLUS prompts the user to make the structure change via the 'Outlet Structure Changes' option on the WinPLUS Main Menu (see Section 5.7). (The structure change can also be made via the 'Structure Changes' button at the bottom of the outlet screen.) If 'No' is selected, WinPLUS simply tracks the change in the historical database and the address/name change is saved to the database.

5.5.4 Edit Checking During View/Update Records

During View/Update, interactive edit checks are limited to invalid entries (e.g., invalid codes in fields such as Interlibrary Relationship, Legal Basis, and Administrative Structure, and alphabetic entries in numeric fields).

Invalid entries are not permitted under any circumstances.   WinPLUS software uses a –2 to indicate a data element that has been left blank. The user **must** make a valid entry (i.e., -1, 0, -3, a positive number, or alphanumeric data, as appropriate). Estimates can be used if exact data are not available. The following responses are acceptable to WinPLUS:

-1	"-1" means "We don't know the answer, don't collect the data, or can't get the data right now."
0	Zero means "We have none of this item." (e.g., the library does not maintain a video collection).
-3	"-3" means "Not Applicable" <u>and is used for these items only</u>**:** • Phone (use only if library has no phone) • Web Address (use only if library has no Web Address) • Square Footage of Outlet (use only for Bookmobiles and Books-by-Mail Only outlets)
Any positive number for numeric data elements	Enter the appropriate numeric data for the data element.
Alphabetic and/or numeric data for alphanumeric data elements	Enter the appropriate alphabetic and/or numeric data. Some items require the selection of codes for data (e.g., Interlibrary Relationship Code = HQ, ME, or NO). See appendices E and F.